

Sample Quarterly IT Plan



For Growth-Minded Dental Practices

Built to support performance, prevent disruptions, and prepare for what's next.

Quarter at a Glance

Objective: Proactively manage IT performance and align systems with operational goals for [Quarter & Year].

Practice Type: [Single Location / Multi-Location / Specialty Practice]

Prepared by: Pact-One Solutions Client Success Manager

SYSTEM HEALTH & PERFORMANCE CHECKS

Goal: Ensure stability, speed, and uptime across all critical systems. Proactively prevent data loss.

Task	Owner	Timing	Notes
✓ Run full hardware diagnostics	IT Provider	Week 1	Check CPU, memory, storage health
✓ Review backup logs for failures	IT Provider	Week 1	Confirm hourly + nightly backups are working
✓ Conduct software update audit	IT Provider	Week 2	Ensure all clinical apps are on latest versions
✓ Monitor system usage trends	IT Provider	Week 3	Identify user-side slowdowns or bottlenecks
✓ Confirm antivirus, firewall, and additional network security protections	IT Provider	Ongoing	Ensure nothing is disabled or outdated

Quarter at a Glance (cont.)

Objective: Proactively manage IT performance and align systems with operational goals for [Quarter & Year].

Practice Type: [Single Location / Multi-Location / Specialty Practice]

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GROWTH & STRATEGIC PLANNING

Goal: Align IT capabilities with expansion, hiring, or technology upgrades.

Task	Owner	Timing	Notes
✓ Assess capacity for adding new ops/providers	Practice & IT Provider	Week 2	Identify hardware/software gaps for growth
✓ Review technology budget alignment	IT Provider	Week 3	Match IT investments to business goals
✓ Plan hardware refresh for aging devices	IT Provider	Week 4	Based on 3–5 year lifecycle plan
✓ Discuss upcoming projects (new location, cloud migration, telehealth, etc.)	Practice	Week 4	Create roadmap for implementation

CLIENT SUCCESS CHECK-IN



NOTES

Quarterly Technology Business Review Meeting:

- Service review and challenges
- Project review
- Walk through status of hardware, backup report
- Agreement review
- Discuss business changes or future goals
- Provide prioritized IT action plan for next quarter

 Next Check-In Scheduled: [Insert Date]

Summary Recommendations

- Your systems are in solid shape, be we recommend:
 - Upgrading [X] devices by [Date]
 - [insert recommendation here]
 - [insert recommendation here]
- Estimated Budget Allocation: [insert range or category-based estimate]